

St. Paul Jewish Federation Community Planning Process

Priority 3: Inspire Giving

Final Report

January 2017

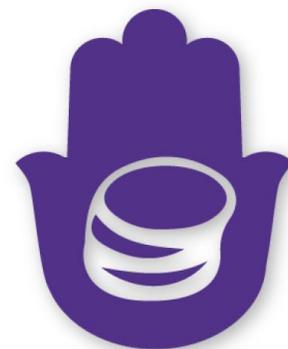




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EXECUTIVE SUMMARY – COMMUNITY PLANNING PROCESS

The Board of Directors of the Jewish Federation of Greater St. Paul initiated the Community Planning Process in the spring of 2012. Through the leadership of a Steering Committee chaired by Randi Roth, the Federation facilitated listening sessions to learn more about what St. Paul's Jewish community was thinking and what people wanted to share. This process engaged more than 350 people and multiple demographics within the community. Through analysis of data from these listening sessions, a guiding principle and five community priorities emerged.

Guiding Principle

To engage all St. Paul Jewish agencies, institutions and synagogues to build a vibrant, cohesive and inclusive Jewish community in Greater St. Paul. To be successful, lay and professional leaders will intentionally work together in ever-increasing collaboration and with common purpose.

Five Priorities

- Build the foundation of community: Warm, welcoming connections
- Engage the next generation: Reach out – *l'dor vador*
- **Inspire giving: Create the commitment to sustain a vibrant and caring Jewish St. Paul**
- Strengthen Jewish education: Find and implement effective models for today's world
- Enhance cooperation between St. Paul and Minneapolis Jewish communities

Research and recommendation panels were convened to identify the current state of affairs, learn from others engaged in similar work locally and nationally, identify realistic goals for the Greater St. Paul Jewish community, and make recommendations for a path forward.

Panel recommendations will be presented to and may be implemented by Federation agencies, independent and bi-city agencies, synagogues and individuals in St. Paul's Jewish community. These intended users are encouraged to use and apply the recommendations in a way that best fits their constituency and organization.

Each recommendation will have an evaluation framework developed to start tracking the process and progress of how the recommendations are both received and used to better the St. Paul Jewish community.



EXECUTIVE SUMMARY – INSPIRE GIVING PANEL

Our panel focused on inspiring giving in the St. Paul Jewish Community. Listening session data related to this topic revealed that people’s concerns were related to the quality of Jewish education and social services, the costs of tuition, membership and services, and the manner in which the Jewish community fundraises. Our charge was to develop recommendations to strengthen the Greater St. Paul Jewish community by inspiring giving among community members.

We began our work with a review of literature and learning from development experts, professionals and donors. We surfaced several foundational elements from the research:

- Giving efforts must benefit the entire St. Paul Jewish community.
- There is a need to build awareness about the history of the Jewish community in St. Paul.
- It is important to engage people in order to develop their investment and ownership.
- Inspired giving requires a focus on relationship building.
- Successful giving efforts must create a personal connection to a cause.
- To inspire giving, we need to place giving in a Jewish context.

Guided by our charge, the research conducted and the principles identified, the panel members propose five strategies with supporting recommendations:

Strategy #1: Engage new and existing donors by expanding the number of giving mechanisms and building trust in the giving process.

Strategy #2: Grow the number of informal engagement avenues where people can learn about, understand and increase their interest in giving their time, talent or tzedakah.

Strategy #3: Expand on and enhance story-based marketing to emphasize the importance of a Jewish St. Paul.

Strategy #4: Amplify the number of people in our community who understand the Jewish context for giving and are willing and able to solicit gifts.

Strategy #5: Federation Specific: Enhance utilization of technology to facilitate and expand giving



THE COMMUNITY PLANNING PROCESS

Listening Sessions

The Board of Directors initiated the Community Planning Process in the spring of 2012. Through the leadership of a steering committee chaired by Randi Roth, the Federation facilitated listening sessions to learn more about what the St. Paul Jewish community was thinking and what people wanted to share. This process engaged more than 350 people and multiple demographics within the community. Community volunteers acted as moderators and note-takers for the listening sessions, asked a set of 12 questions at the meetings, and had participants fill out an exit survey at the conclusion of the session.

Through the course of 37 listening sessions, participants included agency members, staff, volunteers, donors, and various other community members. All ages participated, from teenagers to individuals over 100 years old. Most participants were born in the United States, Israel and the former Soviet Union. There was diversity in where participants lived, marital status, sexual orientation, income and synagogue membership. It was a challenge to engage those who were unaffiliated, meaning those who did not have a membership at a synagogue or Jewish agency.

This phase was led by Rainbow Research, which provided in-depth analysis of listening session data and survey results.¹ Members of the Steering Committee and Leadership Team met to analyze the data and identify priority areas for the community.

What emerged from these discussions included an overarching guiding principle and five priority areas.

¹ Documentation and data created and shared by Rainbow Research can be found here: [COMMUNITY PLANNING PROCESS FINDINGS EXECUTIVE SUMMARY](#)



Guiding Principle

To engage all St. Paul Jewish agencies, institutions and synagogues to build a vibrant, cohesive and inclusive Jewish community in Greater St. Paul. To be successful, lay and professional leaders will intentionally work together in ever-increasing collaboration and with common purpose.

The Five Priorities

- Priority 1. Build the foundation of community: Warm, welcoming connections
- Priority 2. Engage the next generation: Reach out – *l'dor vador*
- Priority 3. Inspire giving: Create the commitment to sustain a vibrant and caring Jewish St. Paul
- Priority 4. Strengthen Jewish education: Find and implement effective models for today's world
- Priority 5. Enhance cooperation between St. Paul and Minneapolis Jewish communities

To this end, the Strategic Planning Steering Committee and Task Forces forged a shared aspirational vision and overarching goals, and they identified a series of issues that impact engagement within each of the different ages and stages, as well as community-wide.

Research and Recommendations Panels

Research and recommendation panels were convened to identify the current state of affairs, learn from others engaged in similar work locally and nationally, identify realistic goals for St. Paul's Jewish community, and make recommendations for a path forward. The committee process would include 8-10 meetings whereby committee members would follow a 7-step approach to research:

1. Define the current state of affairs regarding the issue.
2. Specify scope of work.
3. Learn from evidence by:
 - Examining how other Jewish communities have approached this issue,
 - Examining how non-Jewish communities have approached this issue, and
 - Listening to views of those with deep experience in our community.
4. Make sure we are staying true to the guiding principle in our work.
5. Develop recommendations: (a) realistic aspirational goal for our community; and, (b) realistic path to achieve goal.
6. Communicate back to community. (Make recommendations; write report on what was considered, what was chosen, why.)
7. Evaluate efforts.



INSPIRE GIVING

The Current Situation in St. Paul

During community listening sessions, participants indicated that it was important for them to have high quality, affordable, and accessible Jewish education; cultural activities, social services, a large community presence and infrastructure, and other needs that strong giving and funding in the St. Paul community would support. Specific responses included:

- Good quality religious education options, particularly Talmud Torah.
- Array of high quality services that meet people's diverse needs including services of Sholom and Jewish Family Services.
- Large Jewish community presence and infrastructure.
- Community connections with Israel through travel and funding.

They listed concerns related to giving that included what is perceived as the high cost of tuition for Jewish education, membership and Jewish-based services. Participants also raised questions about whether the greater St. Paul Jewish community engages in sufficient strategic planning and whether fundraising needs are met. Specific responses included:

- Concerns about the financial sustainability and stability of Jewish organizations and institutions.
- Fundraising-related concerns, including how money is raised, the number who contribute, and declining commitment to giving.
- Concerns about adequate strategic planning, including accurate assessments of community change and measurement of success.

The Status of Federated Giving In St. Paul

Federated giving was, and is, a critical agent in community building and creating community investment vehicles. The Jewish Federation of Greater St. Paul has historically played a significant role in the sustainability, stability and growth of Jewish organizations in St. Paul. While giving has not yet returned to pre-recession levels, the Federation is proud that it has not had the sharp decline of many other Federations of similar size and has been able to continue planning and implementing programs, projects and activities crucial to the health of the community. Although there has been a decrease in the number



of donors, the amount of money donated since 2000 and the number of volunteer solicitors², the Federation never slowed its efforts to reach out and has seen giving levels begin to rise. This upward trend offers hope, as it comes at the same time individual agencies are increasing their own fundraising efforts, new agencies have opened in the community, the community has responded to special campaigns for Israel, and Sholom raised \$40M for its capital campaign. Another factor that skews the statistics on the number of donors is that giving has shifted from men and women giving separately to giving as a family unit. This decreases the total number of donors and affects the way inspired giving is approached. Given that several Jewish organizations' funding in the greater St. Paul community comes, in significant part, from the Federation, one cannot discuss financially supporting a vibrant Jewish community without including the Federation as part of the conversation. Fortunately, while there are warning signs to heed, the Federation also has a number of successes that stem, if not turn the tide, to increased giving to the Federation and to the community.

RESEARCH APPROACH AND PROCESS

Meeting 1 – Introduction to Each Other and the Process

Panelists introduced themselves, explained why they joined the panel, and shared their hopes for the process. Some panelists were there because of their experience in development, others because of their own experience giving to the Jewish community, and others because of their hope of connecting with future generations. One person summed it up like this: "I want to help St. Paul feel proud, because there is a lot to be proud of." This person described her hope that the panel would develop something that excited people and inspired them to give. Next, the panel Chair provided an overview of the Community Planning Process and discussed the current situation in St. Paul as described in the report produced by Rainbow Research after the listening sessions.

Meeting 2 – Defining the Panel's Task

The panel meeting opened with brief introductions, as some panel members were not able to attend the first meeting. Panel members then began a discussion in response to

² See Appendix 1



questions raised in the first meeting, including: 1) What differences are there, if any, in giving by age and generation? 2) What is our scope and focus? 3) What constitutes success? 4) Where do we go from here?

Meeting 3 – Articulating Scope and Focus

Meeting three began with a deeper discussion of scope and focus. It was decided that the *focus* of the panel's work includes not just financial giving, but should be more broadly interpreted to include giving of time, money, and talent. The *scope* is not just the Federation, but all Jewish organizations in the Greater St. Paul community. The panel members agreed that everyone benefits when giving is elevated across the community/. Panel members then discussed the spirit of the panel members' work -- it's about inspiring giving within the context of building community and relationships.

The panel then identified a work plan. The panel discussed the process of learning from the St. Paul Jewish community, other Jewish communities and non-Jewish communities by interviewing people and by researching literature. The panel decided to start the process by interviewing people and organizations who are recipients of funds or experts in fundraising. Appendix 2 displays a table of organizations interviewed.

Meeting 4 – Learning from Fundraising Experts

During the fourth meeting, panel members shared what they learned during interviews conducted between Meetings 3 and 4. Themes arose during the interviews relating to the importance of mission, relationships, stories, family history and culture. There also was discussion on donor types, the continuum of giving and the value of the Federation. These themes are presented in greater detail later in this report.

The panel then decided that it was interested in interviewing donors to learn why they give and to hear stories that connect them with Federation and St. Paul's Jewish community.

Meeting 5 – Learning from Millennials

To prepare for this meeting, Panel 3 members were asked to read excerpts from Panel 2 interviews of 22–35 year olds. They identified two primary themes present in the interviews related to giving: 1) Millennials have fewer resources than Baby Boomers, and 2) Young people donate money based on relevancy and urgency. This raised two questions: 1) Should Federation be more flexible on which organizations they fund?, and 2) Are Federation's giving priorities aligned with the Millennials' giving priorities? If not, what, if anything, ought to be done?



Panelists wondered if Millennials might give less due to a lack of information about the Federated allocation process and a lack of engagement in that process. Panelists also considered to what extent ties with their Jewish backgrounds may impact giving. Panel members determined that the Federation should be able to answer the following questions when engaging donors:

- In what ways can the Federation do a better job than an individual donor in identifying needs in the community?
- In what ways does Federation more effectively support organizations than an individual donor?
- How is Federation relevant?
- What needs does Federation meet?
- Why should I trust the Federation?

Meeting 6 – Reviewing What Was Learned

The panel reviewed the progress of expert, fund recipient and donor interviews. Themes that emerged were:

Expert Interview Themes:

- People will stop giving if management changes
- The world of giving is changing; people don't want to be sold
- People won't give when they can't identify the impact
- People don't give when the organizational perspective doesn't align with their own views
- People need to trust the organization
- People give when they have a personal connection or are inspired

Donor Interview Themes:

- Adding value to the community
- Distrust impacts giving
- Being able to see the impact is important
- Need to generate more awareness that this (giving) is what we do as a community
- People want to give to something that is relevant to them
- There are divisive issues that might impact engagement or giving



Meeting 7 – Emerging Recommendations

The panel spent a significant portion of the meeting discussing items that need to be considered in making recommendations.

Telling the story of a Jewish organization is critical to giving – Communication is critical to connecting people to an organization’s mission, philosophy, impact and role in the Jewish community. Without communication, there is no source of inspiration. Needs must be communicated effectively and with transparency to increase knowledge of Jewish organizations, and to increase giving of time, talent, or tzedakah by donors.

Telling the story of the Federation – We need to increase awareness of Federation support to community agencies. It is important that donors know the true impact of Federation dollars, including the percentage of an agency’s funding that comes from Federation dollars. In addition, people should know how the Federation giving model evolved and why it is important.

Inspiration and passion - People give to organizations about which they are passionate. Our recommendations should inspire people to feel passionate about the community as a whole and offer clear ways for people to engage their energies.

Meet people where they are - Not everyone can give financially, and if they can give financially, not everyone is capable of giving large donations. Relationships, connections and passions that lead to increased giving require meeting people where they are and creating opportunities for them to give time, talent, and tzedakah in different ways and varying amounts across their life span.

Meeting 8 – Review Paper and Draft Recommendations

The panel began the meeting by reviewing a first draft of the final report. Feedback ranged from general comments to specific comments about sections of the report. First, panel members discussed how to best frame the report’s vision focus statements. Next, the group discussed the proper structure for the principles and recommendations. The panel discussed tying the principles into the tactics and evaluation sections to create a more coherent report. Final discussions centered around communicating findings to the broader community, reviewing the donor interview sample, and adding a new appendix with all of the interview scripts.



Meeting 9 – Finalize Report and Recommendations

The panel discussed the foundational elements to giving identified during the course of its research. The balance of the meeting centered on discussing recommendations, including:

- Engage Millennials through grants for start-ups, new projects or social entrepreneurship;
- Encourage agencies to publish their histories;
- Help agencies and volunteers find each other through a centrally managed system;
- Fund special projects connected to a cause;
- Enhance the Federation website so that it is mobile-friendly;
- Continue parlor meetings to engage people and educate them about the work of Federation; and
- Create engagement avenues and a process for receiving feedback from community members.



RESEARCH AND RESOURCES

The panel reviewed literature on giving within and outside of the Jewish community, interviewed experts in development, and interviewed donors in St. Paul's Jewish community. Below is an overview of the research and resources reviewed; see Appendix for expanded detail on the research phase sources.

Giving in Jewish Communities

The panel reviewed a set of six reports from “Connected to Give”³ that synthesizes findings from the National Study of American Jewish Giving. The brief literature review focused on current literature about Jewish Giving. It was not meant to be exhaustive, but rather to provide a foundation for some of the panel's thinking and to help the panel identify possible lines of inquiry.

Giving in Secular Communities

The panel reviewed five commonly cited writings on giving and donor types: Susan Howlett's “Seven Donor Types”; Rai Ringles' “The Gift of Asking – A Fresh Perspective on Fundraising”; Julie Salamon's writing on “Rambam's Ladder: A Meditation on Generosity and Why It is Necessary to Give;” and Kenneth Dayton's “Stages of Giving.” This review was not meant to be exhaustive, but rather to provide a foundation for the panel's thinking and lines of inquiry.

The St. Paul Jewish Community: Expert/Professional Perspectives

The panel conducted initial interviews with experts and donees who had significant experience with fundraising and inspiring giving.

Examples of questions asked include:

- How do you define giving?
- What do you do to inspire people to give time and money to your organization? What strategies have gone particularly well? What have not worked as well?

³ <http://connectedtogive.org/>



- Have you made targeted efforts to engage individuals not already connected with your organization or your community? What worked well? What did not work as well?
- Do you have any materials that you can share with us or direct us to?

After compiling the results of these interviews the following themes were identified:

- **Mission.** Defining the mission is crucial. People will not give if they aren't clear about what an organization does.
- **Relationships.** Relationships, developed and sustained over time, are a driver for continued giving and fundraising.
- **Stories.** Stories inspire. Stories about the impact of an organization's work allow for a personal connection to the organization's mission.
- **Family history and culture.** Giving is about family history and culture, and the influence can go both ways. Children can learn about giving from their parents. Today's parents are more involved with their children, creating an opportunity for parents to learn about giving from their children.
- **Incentives.** Incentives or returns on investment can encourage giving.
- **Donor types.** Not all donors are the same. Some invest in the idea, others in the product, and others in a relationship with a person or institution.
- **Continuum of giving.** The interviewees and texts they recommended made it clear that there is a continuum of giving. Some donors gave only because they were asked, some gave as much as possible, and some felt ownership and investment in their giving.

Looking at these themes, it's important to remember that it can be difficult to convince people to give to the Federation when some donors, particularly young donors, question why they should give through a perceived "middleman."

The St. Paul Jewish Community: Donor Perspectives

The panel chose to conduct interviews with different age groups, including Boomers, Generation Xers and Millennials.

Examples of questions used in the interviews:

- 1) If you had all the money in the world:
 - a. Where would you give?
 - b. Where in the Jewish community would you give?
 - c. Is the Federation one of the organizations in the Jewish community you might give to?
- 2) If you are already giving, why do you keep giving?
- 3) What inspires you in your daily life? What gets you excited?



- 4) Under what circumstances would you start giving and at what age?
- 5) In what stage of your life would you start giving? What makes you feel good when you give?
- 6) What have you given to in the past? What motivated you to give?
- 7) What defines a gratifying gifting experience for you?
- 8) Can you share a story about a giving experience that was particularly meaningful for you?
- 9) Do you have any potential recommendations, such as giving circles or efforts to educate younger people about the Federated giving process?

The interview sample included:

- 18-35 year olds: 4 Interviewees
- 35-50 year olds: 4 Interviewees
- Over 50: 5 Interviews

Donor interview themes

- **Value.** Donors described contributing to organizations that they feel add value to the community. As donors' values or priorities changes, so does their giving.
- **Relevance.** People want to give something relevant to them. As their lives change, what's relevant to them also changes.
- **Trust.** Donors give to organizations they trust. They will stop or decrease giving if trust is never established or broken.
- **Impact.** Being able to see the impact of the work is important.
- **Transparency.** Transparency is a component of building trust and being able to tell the story of impact.
- **Politics matter.** There are divisive issues that might impact engagement or giving; for example, an organization's stance toward Israel.

Several donors expressed that they felt there was a need to generate more awareness that giving is what we do as a community. In essence, they were articulating the desire to deepen and expand the current culture of giving in the Greater St. Paul Jewish community.

- Most interviewees (7) listed the organizations' causes and their personal connection to those causes as the main reason they gave.
- Many interviewees (5) started giving to organizations or causes as a child.
- Interviewees continue to give for several reasons: they are actively engaged in similar work of the organization to which they are giving, their giving aligns closely with their priorities, and they have a strong sense of responsibility to support their community.
- Interviewees would **start** giving to new organizations if they formed a personal bond or connection, came upon additional resources, or found new interests and life experiences.



- Interviewees would **stop** giving if they felt the organization was making ineffective use of resources, wasn't reaching expectations, lacked transparency, or if they lacked active engagement with the organization or cause.
- Most interviewees stated that they felt good when they gave if they knew that they made a difference or if they felt a sense of accomplishment.
- Helping people, family, and friends were listed as the main things that inspired interviewees in their daily lives.
- When interviewees were asked where they would give if they had all of the money in the world, a majority included Federation, Jewish community organizations and synagogues in their responses. Other responses included homelessness, Israel, family, children, literacy and hunger.

WHAT WE LEARNED

The Panel synthesized their learning from the research phase and identified the following:

There's a social component to giving: **People are inspired to give when people they admire and care about give.** It is clear from the literature and panel members' experiences that people give when those they respect model giving and/or ask them to give. So how do communities create a culture of giving? ***What does it take to create a culture of giving?***

People give to causes about which they care. Jews contribute a lot, and they give to causes about which they care as evidenced by the stories shared by our panel members and by the research literature. A recent study found that more than 90 percent of Jews who report a high level of involvement in Jewish life give both to secular and to religious charities, while only 58 percent of Jews who report a "very low" level of involvement give to any kind of charity.⁴ Some inspiration comes from giving to a niche issue or topic that the donor is interested in supporting. ***How can we understand what niche causes people in the Greater St. Paul Jewish community to give?***

How and why people give changes during the course of their lives. People's needs change over the course of their lifetimes. At certain points, people are interested in

⁴ "Jewish Donors Are Generous, Especially to Non-Jewish Causes", Chronicle of Philanthropy, September 06, 2013



children's programs, and they later may be interested in Hillel or Sholom. Part of what inspires people is their stage of life. It behooves organizations to understand this and develop long-term relationships with donors, staying connected to them even when they are in a phase of life when they are less able to give or less interested in giving. ***How can we develop a continuum of giving opportunities for people that engages them over the course of their lives?***

In the age of information, people expect transparency and relevancy. Millennials, in particular, highly value transparency which helps establish a path of relevancy. The panel discussed that the Federation is a place for all to sit around a table and identify and move resources toward community needs as they develop and change. Federation must be seen as credible, transparent, and relevant to current and future donors in making allocations decisions. ***How do we communicate that dollars are directed to causes about which donors care, and that the money raised is being effectively allocated?***

People engage in programming that is relevant and matters to them. Figuring out different types of programs that connect with people is an important way to inspire and draw people into a community. There should be different touchpoints for people interested in engaging in a community and different ways for them to donate their time, talent and tzedakah.⁵ ***How do we provide and communicate relevant opportunities for people to connect and give of their time, talent, and tzedakah?***

⁵ <http://www.amazon.com/The-Generosity-Factor-Discover-Treasure/dp/0310324998>



VISION & RECOMMENDATIONS

Vision for Inspired Giving

St. Paul's Jewish community produces a culture of giving by connecting people to each other, to the Jewish community and to Jewish organizations by creating meaningful opportunities for people to give time, talent, and tzedakah and by fostering transparency on how those gifts are used toward meaningful causes.

Foundational Elements

- **To inspire giving, we need to put giving in a Jewish context.** The panel recommends that we work to grow the community's understanding of the Jewish concept of tzedakah.
- **Successful giving efforts must create a personal connection to a cause.** The panel recommends that we strive to help donors feel inspired to make a gift because of a cause that personally touches them. Research from development professionals made clear that people connect to a mission and need to feel a connection with the work of an organization. Interviews with donors further emphasized this point, as most interviewees listed an organization's cause and personal connection as the main reason they gave.
- **It is important to engage people to develop their investment and ownership.** The panel recommends that St. Paul's Jewish community strive to give donors opportunities to be involved and build investment and ownership in their donation of time, talent, and tzedakah. Research indicates that today's donors desire transparency and feeling part of the process. The panel's research also indicates the existence of different types of donors. Some give because it's in their DNA, some give to make their community better, some have an affinity to the community, and some give because it's what their family does (Susan Howland, "Seven Donor Types," see Giving in Secular Communities). Creating new avenues for engagement appeals to the different types of donors and results in new, alternative paths to giving.
- **Inspired giving requires a focus on relationship building.** The panel recommends developing relationships with donors to build trust, develop leaders and increase overall giving in St. Paul's Jewish community. Panel interviews with development professionals and donors clearly indicated the importance of relationships to drive continued giving and fundraising.



- **Giving efforts must benefit the entire St. Paul Jewish community.** The panel recommends a focus on inspiring giving for the broader community and articulating clearly where donations are directed. Data from the Listening Phase indicated the importance of a solid, broad-based Jewish infrastructure supported by the community as a whole.
- **There is a need to build awareness about the history of the Jewish community in St. Paul.** The panel recommends a focus on teaching donors in St. Paul about the history of the organizations to which they give. A consistent theme across the expert and donor interviews and research was the importance of connecting donors to the organization's past and continuing story. Knowing the history of each organization and its context in the community is a critical component of that story-telling.

Recommended Strategies

1. **Engage new and existing donors by expanding the number of giving mechanisms and building trust in the giving process.**
 - Create Giving Circles to develop current and future leadership and investment in giving to St. Paul's Jewish community. It will be important to work collaboratively with agencies and synagogues in creating these Giving Circles.
 - Invite diverse groups of all ages to participate in donation and funding decisions.
 - Initiate a micro-grant program to engage "hard to reach" or "yet to be reached" people.
 - Increase giving opportunities that have a "personal connection" and bring new partners to our work.
 - Enhance use of the Federation's Gesher l'Keshet Fund to encourage and inspire teen giving.
- **Implementation Tactics**
 - Some "Giving Circles" may be Twin Cities-wide in collaboration with the Minneapolis Jewish Federation. However, it is proposed to initially pilot one or two in St. Paul with Giving Circles focused on newly-engaged young donors (ages 22-35).
 - Consider a 2:1 match in the funding base for the Giving Circles and micro-grant program. Perhaps start with \$15,000, where \$10,000 is funded by Federation and \$5,000 is raised by Giving Circle members via direct contributions and solicitation.
 - Take a fresh look at the Gesher l'Keshet Fund and explore how it could be enhanced to achieve greater results. For example, the Federation might become more proactive in helping teens set up, monitor, and allocate their funds; or, there might be an opportunity to pool funds and create a teen Giving Circle. Engage the



individuals who set up funds as teens but have not allocated the funds.

2. Grow the number of informal engagement avenues where people can learn about, understand, and increase their interest in giving their time, talent or tzedakah.

- Develop a process to ensure that engagement avenues stay current and fresh. Tactics to consider: a yearly focus group, an annual or bi-annual retreat, establishment of an advisory council, a “cascading conversations” approach, parlor meetings.
- Expand opportunities to volunteer with local agencies. These might be opportunities with Jewish agencies or volunteer opportunities at non-Jewish agencies but organized by the Jewish community.
- Resurrect “local mission trips” to educate donors about local agencies and community-wide impact and need.

3. Expand on and enhance story-based marketing to emphasize the importance of a Jewish St. Paul and the value of being philanthropic.

- Detail personal and organizational stories impacted by Federated giving.
- Use narratives that inspire effective messaging for giving in St. Paul.
- Grow the story-based culture among the St. Paul agencies so that there is a ready supply of stories that reach both depth and breadth.

➤ Implementation Tactics

- Coaching and guidance on which stories to develop and how best to communicate them should be done utilizing Federation and agency public relations, marketing, and/or communication staff and committee expertise.

4. Amplify the number of people in our community who understand the Jewish context for giving and are willing and able to solicit gifts.

- Create and disseminate a tzedakah curriculum so that more Jews understand that tikkun olam in all forms is a Jewish value.
- Engage more people in various aspects of the fundraising cycle: Identification, Cultivation, Solicitation, and Stewardship.
- Create increased opportunities for involvement in the solicitation portion of the fundraising cycle.
- Provide community-wide training on solicitation techniques.



5. Federation Specific: Enhance utilization of technology to facilitate and expand giving.

- Continue to ensure that the Federation website is user- and donor- friendly.
 - Continuously enhance mechanisms for web-based giving.
 - Ensure web presence is mobile friendly (responsive web design).
- Implement a Customer Relationship Management (CRM) approach that includes a CRM data system, data collection, and data management in order to:
 - Facilitate relationship building and engagement through more detailed information-capturing in the database.
 - Allow for more detailed data retrieval on where donations go and the history of giving in St. Paul.
 - Enable data analysis of Federation's current and historical impact on each of the St. Paul agencies.

EVALUATION

The Community Planning Process used a seven-step approach to guide the panel process. The seventh step called for panels to evaluate the recommendations set forth by research. The panel suggests evaluating each recommendation for 1) how it supports the foundational elements; and 2) whether its outcomes achieve success as defined by the implementation process.

Supporting Foundational Elements

The evaluation should consider whether the recommendations achieve crucial values according to the panel and research on inspired giving. For example, screening Giving Circles against the foundational elements and research findings might ask:

- Do Giving Circles benefit the entire Jewish community?
- Do Giving Circles help people develop investment and ownership?
- Do Giving Circles focus on relationship building?
- Do Giving Circles create a personal connection?

Measuring Success

The evaluation should also consider how successful each recommendation is in achieving its goals. These goals should be flexible, depending on the specifics of program planning and implementation. Measures that may be appropriate for the Giving Circle example and other strategies include:

- Number of organizations involved in the Giving Circles.



- Affiliated and non-affiliated members in the Giving Circles.
- Number of people of diverse ages involved in the Giving Circles.
- Percentage of young adults (ages 22-35) involved in Giving Circles who stay engaged in St. Paul's Jewish community in some way.
- Allocation of dollars for Giving Circles stays stable or increases compared to the previous year.
- Number of stories shared.
- Variety of stories (individual, agency).
- Donor feedback on website.
- Extent to which the community's history is disseminated.
- Clear display of where donations are used.
- Annual audience/millennial/donor survey.
- Increase in number of donors.
- Increase in dollars donated.
- New campaign workers.
- New committee members.

CONCLUSION

We have a special community in St. Paul and want to build awareness, continue to engage people, and expand giving. The Panel hopes that its research and recommendations will help the St. Paul Jewish community to inspire giving of time, talent, and tzedakah. By implementing the recommendations contained in this report, we intend to create a culture of giving in St. Paul so people connect to each other, to the Jewish community, and to Jewish organizations. We intend to increase gifts to address meaningful causes in our community.



APPENDIX

Appendix 1: Jewish Federation of Greater St. Paul Giving Data, 2000-2015

Year	# of Workers	# of Donors*	% Change Donors	Overall \$ Donated	% Change \$
2000	205	3,506	-	\$2,802,544	-
2001	199	3,077	(12.2)	\$2,764,567	(1.4)
2002	179	2,917	(5.1)	\$2,667,026	(3.5)
2003	189	2,523	(13.5)	\$2,613,577	(2.0)
2004	188	2,372	(6.0)	\$2,597,516	(0.61)
2005	199	2,458	3.6	\$2,689,644	3.5
2006	237	2,850	15.9	\$2,676,214	(0.5)
2007	211	2,791	(2.1)	\$2,708,966	1.2
2008	159	2,800	0.32	\$2,647,171	(2.3)
2009	146	2,406	(14.1)	\$2,406,436	(9.1)
2010	181	2,304	(4.2)	\$2,277,665	(5.4)
2011	162	1,920	(16.7)	\$2,272,287	(0.24)
2012	139	1,910	(0.5)	\$2,197,121	(3.3)
2013	132	2,050	7.3	\$2,174,960	(1.0)
2014	129	1,896	(7.5)	\$2,133,340	(1.9)
2015	111	1,614	(14.9)	\$2,282,707	7.0

* The way people give has shifted from men and women giving separately to giving as a family unit, which decreases the total number of donors.



Appendix 2: Leadership Team Members

Rabbi Morris Allen
Tracy Arnold
Jennifer Bagdade
Wendy Baldinger
Rabbi Shlomo Bendet
Steve Brand
Barbara Brooks
Tom Cytron-Hysom
Rabbi Jeremy Fine
Ted Flaum
Burt Garr
Barry Glaser
Leslie Hahn
Steve Hunegs
Miriam Itzkowitz
Benjie Kaplan
Jean King
William Lipschultz
Rhoda Mains
David Milavetz
Susan Minsberg
Jeffrey Oberman
Jonathan Parritz
Randi Roth
Dan Rybeck
Steven Shaller
Judy Sharken Simon
Sally Silk
Eli Skora
Rabbi Adam Spilker
Julie Swiler
Jeff Tane
Michael Waldman
Mary Ann Barrows Wark



Appendix 3: Panel Member Biographies

Panel Chair Susan Minsberg

Susan is the immediate past president of the Jewish Federation of Greater St. Paul. She also is a past president of Talmud Torah of St. Paul and has served on the boards of the St. Paul Jewish Community Center, Jewish Family Service, Hillel at the University of Minnesota, and Hadassah. Susan grew up in the only Jewish family in Crookston, Minnesota. She is a lawyer in private practice in St. Paul. She and her husband, Michael, have lived in St. Paul for 33 years and have 2 adult daughters. They are active members of Beth Jacob Congregation.

Steve A. Brand

Steve is the current president of the Jewish Federation of Greater St. Paul. He is Past President of Jewish Vocational Service of St. Paul, Mount Zion Temple, and the Sholom Foundation. Steve is a life-long resident of St. Paul. He practices law with Robins Kaplan LLP, specializing in estate planning, trust and estate administration, and related fields.

Jon Brod Farber

Jon is a Senior Vice President at Chubb Insurance Group and holds an MBA in Risk Management and Finance. He currently serves on the Jewish Federation of Greater St Paul's Board of Directors. Jon has served on the boards of the Minnesota Jewish Theatre Company, JCRC, Project for Pride In Living, The Neighborhood House, and The Science Museum of Minnesota. Jon, his wife Holly and their three children are active members of Beth Jacob Congregation, and they support numerous local Jewish organizations, institutions and camps.

Leslie Hahn

Leslie Hahn is a retired internist and geriatrician. Raised in Vineland, New Jersey, she lived in Ohio, Kentucky and Georgia before moving to the Twin Cities in 1981. She has been a member of Beth Jacob Congregation since its inception and has served on the boards of Talmud Torah of St. Paul, Twin Cities Jewish Middle School, and Jewish Family Service of St. Paul, including several leadership positions. Leslie lives in Mendota Heights with her husband, Dr. Merrill Biel, and has two adult sons and two granddaughters.

Daniel Lepow

Daniel Lepow has worked in the Jewish community for 30 years, serving primarily as Director for Financial Resource Development (annual campaigns and endowments) and as Missions Director. He has an undergraduate degree in marketing and an MBA in management. He has worked in Jewish and non-Jewish non-profit organizations across the country. He is currently the Campaign Director for the St. Paul Jewish Federation. Born and raised in Philadelphia, he is married with three sons and one grandson.



Michael Levitt

Michael Levitt is a Vice President, Wealth Management Advisor with Rathmanner–Levitt Group of Merrill Lynch in St. Paul. He currently serves on the Jewish Federation of Greater St. Paul’s Board of Directors and its Young Leadership Committee. Michael’s first interaction with Jewish organizations was when his family immigrated to the United States and was helped by the United Jewish Appeal and Jewish Family Services of Chicago. Michael grew up in Mendota Heights. He attended Beth Jacob Congregation, Talmud Torah of St. Paul, and University of Minnesota Hillel.

Rhoda Mains

Rhoda Mains grew up in the only Jewish family in Worthington, Minnesota. She graduated from Stanford University and has lived in St. Paul since she and Don Mains were married in 1954. She has served on most of the St. Paul’s Jewish communal boards over the years, very often involved with fund raising. She is a past president of Jewish Family Service and the St. Paul Jewish Federation. Most recently, Rhoda and Don, along with Allen Freeman, chaired the campaign to raise funds for Sholom’s Shaller Campus.

Susan Robiner

Susan and her family are longtime members of Mount Zion Temple. She has filled many roles at Mount Zion, including chairing committees and teaching in Mount Zion’s Chai School. Susan serves on the Mount Zion Board and Executive Committee and is currently Mount Zion’s President-Elect. She also volunteers in the community, chiefly in the Minneapolis and St. Louis Park school systems. Susan grew up in Minneapolis and converted to Judaism at Mount Zion nearly 30 years ago. In 2006, she was appointed a state court trial judge serving Hennepin County

Marsha Schoenkin

Marsha Schoenkin is on the National Women's Philanthropy Board of the Jewish Federations of North America. She has held leadership roles on the Federation’s Board of Directors, chairing the General and Women’s campaigns. Marsha also is on the Steering Committee of the Twin Cities Cardozo Society, the Pfeffer Award Selection Committee, and has been active in Hadassah. Marsha is a founding member of Beth Jacob Congregation and lives with her husband, Stuart Bear, in Mendota Heights. They have a son living in Los Angeles; and a daughter and grandson in Milwaukee.



Appendix 4: Staff Biographies

David Milavetz, Panel Coordinator

David Milavetz earned a Master of Public Policy degree with emphases in public leadership and nonprofit management from the Hubert H. Humphrey School of Public Affairs at the University of Minnesota, and a BA in International Studies from the University of Denver. He also holds a Certificate in Evaluation Studies through the OLPD program at the University of Minnesota. His training and experience is in program evaluation, research design and implementation in community and cultural settings. David has experience conducting evaluation and research in communities, nonprofits, and informal education organizations. He is particularly interested in using data to support organizations and programs in creating their desired impact.

Nora F. Murphy holds a Ph.D. in Evaluation Studies from the University of Minnesota and an MA in Research Methodology from the University of Pittsburgh. In addition to her formal training, she has developed broad experience as an evaluator by working in and with schools, school districts, community organizations, non-profits, government entities and foundations. Nora has worked both as an external consultant and as an internal evaluator as the Director of Assessment and Evaluation for the Perspectives Charter Schools in Chicago, Ill., and as coordinator for the Minnesota Evaluation Studies Institute. In 2013, she was awarded The Michael Scriven Dissertation Award for Outstanding Contribution to Evaluation Theory, Method, or Practice. She is currently President of the Board of TerraLuna Collaborative, the evaluation cooperative she co-founded with colleagues in 2012, and serves as Program Chair for the Evaluation Use Topical Interest Group of the American Evaluation Association (AEA).



Appendix 5: Interviewed Organizations

The following table shows the interviewees or organizations, and who interviewed them.

Contact Person or Organization	Panel Member
JFNA	Marsha Schoenkin
AFP	Dan Lepow
Minnesota Foundation	Dan Lepow
MN Medical Foundation	Dan Lepow
Outward Bound	Dan Lepow
Headwaters Foundation for Social Justice	Dan Lepow
Randi Roth	Susan Minsberg
Benjie Kaplan/Minnesota Hillel	Tracy Perlman
Jay Louis/Kansas Hillel	Tracy Perlman
Starkey Hearing Foundation	Tracy Perlman
Mary Ann Wark	Rhoda Mains
Make-A-Wish Minnesota	Michael Levitt
Rabbi Cohen	Michael Levitt
Leora/TC Jewfolk	Michael Levitt
Twin Cities Rise	Susan Robiner
Catholic Charities	Susan Robiner
YouthLink	Nora Murphy
Brad Reiners United Seminary	Leslie Hahn



Appendix 6: Literature Review

Giving in Jewish Communities

Sanderson, Jay. CEO of The Jewish Federation of Greater Los Angeles. Remarks presented to Annual Board of Directors Meeting. "Transforming the Jewish Federation of Greater Los Angeles". December 18, 2014.

In his presentation, Sanderson talks about the transformation that the Jewish Federation of Greater Los Angeles made over the past five years. The focus on giving was on three questions regarding their value proposition, "What", "Why", and "How". In part, this Federation post-transformation identified itself not as a fundraising organization, but as a forward thinking, problem solving organization that raises funds to support its mission. Lay committees and staff identify new priority-based initiatives and bold ideas that need funding above the annual campaign. The Federation engages and builds relationships in its community and focuses on the depth, rather than the breadth, of their work.

"Connected to Give: Key Findings from the National Study of American Jewish Giving", Jumpstart Labs. Written by Jim Gerstein, Steven M. Cohen, & J. Shawn Landres. September 3, 2013.

The first in a series of reports based upon the wealth of data drawn from the National Study of American Jewish Giving (NSAJG) and the National Study of American Religious Giving (NSARG). The authors present the challenge as follows:

Today, however, the forces that fostered solidarity and creativity in earlier generations have waned. For example, the argument for Jewish organization-focused philanthropy within the field of human services amidst a panoply of global crises — and new non-sectarian solutions to address them — is weakening. While the federation system has been losing donors and large membership institutions are losing members, Jewish service agencies report growing demand for their core priorities. New and innovative Jewish organizations — some with the best chance of engaging those most ambivalent about Jewish involvement — are struggling to find stable income to sustain themselves, let alone to scale their programs for national or global impact. The Jewish communal system itself, though it contains pockets of significant creativity, no longer leads the way in defining global or even American philanthropic and nonprofit innovation as a whole (pg. 3)

Overall:

- Jewish connection and engagement strongly predict whether Jews give to any cause



and very strongly predict whether they give to a Jewish organization.

- Overall, 28% of American Jews — but 46% of Jewish donors to Jewish organizations — have high levels of Jewish social engagement.
- Those with a high level of Jewish social engagement contribute 5.4 times as much as the “very lows” to all causes (\$5,084 among the “highs” compared to \$949 among the “very lows”), and 67.3 times as much to Jewish organizations (\$2,825 compared to \$42).
- Whether (and how much) Jews give is far more a function of identity and connections rather than motivation.

Younger Jews:

- Are more likely than their older Jewish counterparts to say they would support a Jewish organization “if it serves non-Jewish people and causes” (44% of those under 40, compared 18% of those over 64).
- Have more trouble finding Jewish organizations that address the issues important to them (34% of under-40s, compared to 16% of those over 64).
- Are more open to both nonprofit and philanthropic innovation, and are more willing to support an organization that “has not yet proven it but offers a different approach to address a persistent problem that has been difficult to solve” (50% of under-40s, compared to 25% of those over 64).
- Are much more likely to contribute using an innovative giving method such as mobile phone text message, crowdfunding website, giving circle, microloan fund, or voting in an online competition (37% of under-40s, compared to 10% of those over 64).

Authors’ conclusion:

We believe that the future of the Jewish philanthropic/nonprofit system depends on collective efforts to bring it to the forefront of the 21st century third sector, through innovation, collaboration, and impact by both established institutions serving traditional core priorities and by new nonprofit startups advancing creative alternative paths to Jewish engagement and action. Achieving those results also will require re-energizing core supporters — at all giving levels — whose generosity of time and resources powers the Jewish community.

Connected to Give: Risk and Relevance”, Jumpstart Labs. Written by Jim Gerstein, J. Shawn Landres, and Joshua Avedon. October 21, 2014.

Connected to Give: Risk and Relevance is the sixth in a series of reports based on the wealth of data drawn from the National Study of American Jewish Giving (NSAJG) and the National Study of American Religious Giving (NSARG). The authors present the challenge as follows:



The issues of risk and relevance, and how causes fare in a landscape where giving is more social than ever, are just now emerging as central to philanthropic giving. The findings in this report highlight diverse patterns of religious and Jewish giving; there is no one monolithic “religious” or “Jewish” donor. The complex nature of this data encourages us to look at donors through multiple lenses: social-demographic variables such as age, gender, religious identification and income, as well as attitudinal and behavioral variables. These lead to a picture that is often complicated and difficult to interpret, and remind us that many factors are at work in determining giving choices. Understanding that complex interplay of factors will be a critical skill for charitable causes seeking to communicate urgency and uniqueness in a crowded playing field.

Overall:

- The donors most willing to support an unproven organization generally are those who are most engaged in their religious communities.
- Donors with high levels of religious connection, as well as donors with lower household incomes, tend to be much more concerned with an organization’s trustworthiness than they are with its success record.
- Donors who self-identify as political liberals are considerably more willing than moderates and conservatives to contribute to unproven organizations.
- American donors — especially those with strong religious connections — generally are more likely to support religiously identified organizations that serve all kinds of people and causes than those that benefit only those who share their religious affiliation.
- Social giving — via contributions made through a giving circle, a charitable crowdfunding campaign or a microloan fund — is making substantial inroads among American donors, especially with the most connected.

“Jewish Donors Are Generous, Especially to Non-Jewish Causes”, Chronicle of Philanthropy, September 06, 2013

Overall:

- About 76 percent of Jewish donors say they made a charitable gift last year, compared with 63 percent of non-Jews. Of households that earn less than \$50,000, about 60 percent give, compared with 46 percent of non-Jewish households.
- Fifty-four percent of Jews in the study are more likely to give to social-service charities than to their religious congregations, compared with 41 percent of donors in the study who are not Jewish. What’s more, 92 percent of them give to non-Jewish causes, while 79 percent support Jewish organizations.
- The more deeply involved Jews are in causes connected with their faith, the more likely they are to support both secular and religious charities. More than 90 percent



of Jews who report a high level of involvement in Jewish life give both to secular and to religious charities, while only 58 percent of Jews who report a “very low” level of involvement give to any kind of charity.

- One in five Jewish donors gives only to organizations with no connection with their religion.

Authors’ conclusion:

This interest in helping the broader community is one more fundraisers should recognize when soliciting Jewish donors, says Shawn Landres, chief executive of Jumpstart, a philanthropic research organization. “These are people for whom giving locally matters. They see helping people who need help, irrespective of their religious group, as fundamentally a Jewish value. And so learning how to talk to somebody who thinks in those terms could be very valuable for fundraisers who work on any cause.”

75% of Young Donors Turned Off by Out-of-Date Web Sites, Chronicle of Philanthropy, July 18, 2013

Overall:

- More than eight in 10 young donors have smartphones and use them to read e-mails and articles from nonprofits. Three-quarters of those donors said their biggest frustration when interacting with a nonprofit on a mobile device was finding that its site was designed for a desktop, not for easy access on the go.
- More than 65 percent of young donors receive e-mail or newsletters from as many as five organizations, and 49 percent said they follow up to five organizations on social networks.
- Three in four young donors have liked, retweeted, or shared nonprofit content on social networks.

Giving in Secular Communities: Broad Literature on Giving

Howlett, Susan. “Seven Donor Types”. August, 2013. Accessed from:

http://susanhowlett.com/wp-content/uploads/2013/08/Seven_Donor_Types.pdf

Howlett lists seven Donor Types

- **Altruist:** They give because it’s in their DNA (it’s just what they do).
- **Communitarian:** They give to make their community better (Usually a PTA member, local government, community board member, etc.)



- **Devout:** People who have a strong affinity to it (e.g. a cancer survivor who gives to the American Cancer Society).
- **Dynast:** They give because it's what their family does (Generational donors, parents gave to synagogue, kids give to synagogue).
- **Investors:** Donors who see a return on investment (Parents who give to the Talmud Torah because they have a child and want to ensure the program is strong and successful).
- **Repayers:** These donors liked an experience and want to donate to continue that program for others to also enjoy (I went to Herzl, so I'm going to donate so other kids can go to summer camp).
- **Socialite:** Donors who give because it gets them into parties or in the social crowd. Tends to be younger donors.

Ringel, Rae. "The Gift of Asking – A Fresh Perspective on Fundraising". November 12, 2014.

Ringel talks about asking as being a chance to provide a donor the opportunity to do a just and good deed. Many donors just want to be asked and to be a part of the work. Ringel argues for a shift in mindset and that when making "an ask, we should be confident in what we are offering and the worth of our cause.

Julie Salamon, Author, 'Rambam's Ladder: A Meditation on Generosity and Why It Is Necessary to Give'. February 4, 2004.

There are 8 steps on Rambam's Ladder:

- 8) **Responsibility:** The gift of self-reliance. To hand someone a gift or a loan, or to enter into a partnership with him, or to find work for him, so he will never have to beg again.
- 7) **Anonymity:** To give to someone you don't know, and to do so anonymously.
- 6) **Corruption:** To give to someone you know, but who doesn't know from whom he is receiving help.
- 5) **Boundaries:** To give to someone you don't know, but allow your name to be known.
- 4) **Shame:** To hand money to the poor before being asked, but risk making the recipient feel shame.
- 3) **Solicitation:** To hand money to the poor after being asked.
- 2) **Proportion:** To give less to the poor than is proper, but to do so cheerfully.
- 1) **Reluctance:** To give begrudgingly. At this level, Maimonides says the person gives with a frowning countenance.



Kenneth Dayton. “Stages of Giving”. Independent Sector, 1999.

Ken Dayton, former CEO of Dayton Hudson, spoke in 1999 of the philanthropic stages of development drawn from his family’s five decades of experience growing from tithers to giving with a higher standard of philanthropic intentionality.

1. Minimal Response: Giving because we were asked and only because we were asked.

2. Involvement and Interest: You believe in the cause, and you want to make it better. It becomes meaningful and purposeful.

3. As Much As Possible: A major transformational breakthrough that requires thinking, a budget and priorities.

4. Maximum Allowable: The IRS five-year carry-forward provision gave us an opportunity to plan and to think creatively about our philanthropy. It meant we could initiate projects.

5. Beyond the Max: We ignored the IRS maximum and began to give what we wanted to give. The second breakthrough came when we decided we no longer would let the IRS tell us how much (or how little) we could give.

6. Percent of Wealth: If one no longer measures giving against income or income tax deductibility, logic soon leads to using total wealth as a measure. Until we started to measure our giving against our wealth, we did not fully realize how much we could give away and still live very comfortably.

7. Capping Wealth: How wealthy do we want to be? This means setting a limit on your wealth and giving away everything you earn beyond that figure.

8. Reducing the Cap: We are not there yet. Whether we will ever have the courage and fortitude and intelligence to lower the cap as we get older we cannot say. But, we are comfortable discussing the subject.

9. Bequests: Long ago, we decided we had transferred enough of our assets to our heirs. Accordingly, we are able to leave almost all of our assets to the nonprofit organizations we have selected.